
The OrgChange.AI Dispatch - May 2026

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Design has got to precede deployment.

CRAIG RUSSELL

MAY 6



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AI-enhanced organizational change is more about design than deployment.

- Case studies show where AI is already changing workflows, roles, customer interactions, and governance routines
- Leadership quotes sharpen the executive mindset required to move from pilots to operating-model change;
- The OrgChange.AI Nine-Square Grid translates the evidence into a practical change architecture across people, process, and technology.

The through line is simple: AI value scales when leaders redesign the work, build trust into the system, and make change capability a permanent operating muscle.

Case Studies

Organization	Org Change Tools			
	Learning	Communications	Workflows	Governance
American Arbitration Association	X	X	X	X
ANZ Bank				X
Australian Firms Adopting AI	X	X		X
Capital One				X
Corporate Venture Builders Using AI			X	X
Education Technology Company (anonymous)	X		X	
Klarna		X		X
Large U.S. Retail Bank (anonymous)			X	X
Manufacturing Firms Using Connected-Worker AI	X		X	
Mercedes-Benz	X			X
Microsoft	X	X	X	
Novo Nordisk				X
Pearson	X			
Rolls-Royce				X
Semiconductor Manufacturer (anonymous)	X		X	
U.S.-based Logistics Co. (anonymous)	X	X	X	
U.S. Hospitals and Health Systems	X			

U.S. Hospitals and Health Systems

AI tools: AI and machine-learning predictive models; EHR-developer models; locally developed predictive models; accuracy and bias evaluation processes.

How AI augments organizational change: Hospitals are using AI to change care delivery, administrative work, scheduling, billing, risk prediction, and governance routines around model evaluation.

A national hospital study found that AI and predictive models are already embedded across clinical and administrative workflows: predicting inpatient risk, identifying high-risk outpatients, monitoring health, recommending treatments, simplifying billing, and scheduling. The organizational-change issue is not only adoption, but institutional capability: model governance, local evaluation, bias assessment, and resource gaps can create a new digital divide. OCM takeaway: health systems need change governance that pairs AI deployment with local validation, bias review, education, and clear accountability before clinicians and administrators can trust model-supported decisions.

Source: Nong, Adler-Milstein, Apathy, Holmgren, and Everson, "Current Use and Evaluation of Artificial Intelligence and Predictive Models in US Hospitals."

Australian Firms Adopting AI

AI tools: Generative AI and AI-enabled business applications; adoption practices across Australian organizations.

How AI augments organizational change: Australian organizations are using AI adoption as a managerial change challenge involving leadership, capability, and implementation readiness.

The Australia AI adoption source is useful as an aggregate field case: it frames adoption as an organizational capability problem rather than a tool-selection problem. For change leaders, the implication is that AI adoption depends on management routines—prioritization, skill-building, experimentation, governance, and communication—not merely access to generative AI tools.

Source: "AI Adoption—Australia."

U.S.-based logistics company (anonymous)

AI tools: Open-source and off-the-shelf AI invoice-processing components; AI-generated invoice validation; ERP integration; SME annotation and feedback loops.

How AI augments organizational change: The company used AI to convert a fragmented, manual invoice workflow into a faster, governed operating model.

A \$1B+ refrigerated-trailer logistics company was processing more than 100,000 maintenance invoices annually through channels that included fax, email, phone calls, and other unstructured inputs. Seven full-time employees were dedicated to consolidating invoices, matching them to templates, validating work, entering data into the ERP, and generating client invoices.

The change-management lesson is that the AI tool was not the hard part. Before deployment, the organization simplified years of accumulated

templates, reducing thousands of inconsistent forms to a smaller, usable set. SMEs then reviewed thousands of AI outputs and explained mistakes so the model and process could improve. Executive sponsorship was unusually visible: the president joined weekly check-ins to remove blockers and create operational buy-in.

The new operating model reduced the invoice team from seven to two FTEs, achieved 85% accuracy, processed invoices in under 24 hours, and reached production in eight weeks. Importantly, the displaced capacity was redirected to other bottlenecks, making this a people-process-technology change rather than a pure automation story.

Source: Stanford Digital Economy Lab, The Enterprise AI Playbook, “Invoice Processing at a Logistics Company.”

Semiconductor Manufacturer (anonymous)

AI tools: AI field-service assistant; knowledge retrieval; issue-triage support; executive-sponsored rollout.

How AI augments organizational change: The manufacturer used AI to improve field service knowledge flow and showed that executive sponsorship matters most when workflows cross technical and operational boundaries.

The semiconductor company had multiple departments with different technical needs, including engineering, IT, operations, and finance. Field-service work depended on specialized knowledge, consistent troubleshooting, and rapid access to the right information.

The AI initiative augmented change management by giving field teams a support layer for triage, knowledge retrieval, and repeatable guidance. The organizational work centered on sponsorship and alignment: leaders had to clarify where the assistant fit in the service workflow, what decisions remained human-owned, and how technical teams would maintain trusted knowledge assets.

The case demonstrates that AI adoption in complex technical environments requires more than tool access. It requires visible leadership, role clarity, and

feedback mechanisms so frontline users can trust and improve the system over time.

Source: Stanford Digital Economy Lab, The Enterprise AI Playbook, “Field Service at a Semiconductor Company.”

Education Technology Company (anonymous)

AI tools: AI engineering assistants/coding acceleration; AI-supported content workflows; human engineering and content review.

How AI augments organizational change: The company framed AI as a capacity multiplier, not a headcount-cutting mechanism, which helped align engineers and content teams around adoption.

The education technology company had thousands of employees, more than 200 technology staff, and more than 100 engineers supporting continuing education and professional certification products in regulated industries. Its AI adoption touched both engineering productivity and content-production workflows.

The notable change choice was narrative and intent: leaders chose acceleration over headcount reduction. That helped shift the adoption conversation from job threat to organizational throughput—how AI could help teams ship, maintain, and update regulated learning products faster while keeping humans accountable for quality.

This case is useful for change leaders because it shows how the purpose attached to AI can determine the adoption climate. When employees understand that AI is intended to remove bottlenecks and increase impact, they are more likely to participate in experimentation, feedback, and workflow redesign.

Source: Stanford Digital Economy Lab, The Enterprise AI Playbook, “Engineering at an Education Technology Company.”

Large U.S. Retail Bank (anonymous)

AI tools: Cloud-based AI for customer-facing support; controlled data architecture; compliance and risk-management governance.

How AI augments organizational change: The bank's AI adoption required a cultural and governance shift from "everything inside the firewall" toward controlled use of cloud AI.

The large retail bank served millions of customers through mobile apps, branches, and call centers while operating under federal banking regulations and prior compliance constraints. The core challenge was not whether AI could help customers; it was how to use AI in a way that satisfied security, risk, and regulatory expectations.

The initiative augmented change management by forcing alignment among technology, risk, compliance, customer operations, and business leaders. Moving from an internal-only posture to cloud AI required new governance, data controls, escalation patterns, and confidence-building with stakeholders who were understandably cautious.

The case is especially relevant for regulated enterprises: AI transformation often begins as a technology debate but succeeds as a trust-building program. The change work includes policy, architecture, stakeholder education, and proof that customer-facing AI can be both useful and controlled.

Source: Stanford Digital Economy Lab, The Enterprise AI Playbook, "Customer-Facing at a Large Retail Bank."

Corporate Venture Builders Using AI

AI tools: AI-assisted venture-building, market analysis, prototyping, customer discovery, and scaling tools.

How AI augments organizational change: McKinsey's business-building article shows how AI can compress venture-building cycles and change how corporate innovation teams work.

The article emphasizes using AI to build businesses faster and better by augmenting opportunity identification, research, design, and execution. OCM

takeaway: corporate venturing requires role redesign across strategy, product, legal, finance, and operations so AI-generated speed does not outpace governance or stakeholder alignment.

Source: McKinsey, "How to Build Businesses Faster and Better with AI."

Mercedes-Benz

AI tools: Google Cloud Automotive AI Agent; Gemini; Vertex AI; MBUX Virtual Assistant integration.

How AI augments organizational change: Mercedes-Benz is using an automotive AI agent to shift the in-car customer experience toward natural, multimodal, multilingual interaction.

The change is more than a product feature: it changes customer support expectations, software-release practices, data governance, and service training. OCM takeaway: AI embedded in customer experience requires coordinated change across product, engineering, customer support, legal, and dealer/service ecosystems.

Source: Capgemini Research Institute, "Rise of Agentic AI: How Trust Is the Key to Human-AI Collaboration."

Rolls-Royce

AI tools: ServiceNow AI Agent Orchestrator; coordinated specialized AI agents across IT, HR, and customer service workflows.

How AI augments organizational change: Rolls-Royce is using AI-agent orchestration to coordinate multiple specialized agents toward business goals across functions.

This is an operating-model change because orchestration connects workflows that historically lived in departmental silos. OCM takeaway: cross-functional agent orchestration requires governance for ownership, exceptions, escalation, and service accountability.

Source: Capgemini Research Institute, "Rise of Agentic AI."

Capital One

AI tools: Concierge AI agent for car-dealership clients.

How AI augments organizational change: Capital One deployed an AI concierge to help dealership customers obtain vehicle information and book test rides.

The deployment changes customer and dealer workflows by moving routine discovery and scheduling into an AI-assisted interaction. OCM takeaway: AI adoption should include dealer enablement, customer-journey redesign, and metrics beyond task completion—such as trust, conversion, and handoff quality.

Source: Capgemini Research Institute, “Rise of Agentic AI.”

ANZ Bank

AI tools: Agentic AI for repetitive-task automation, decision support, and system integration.

How AI augments organizational change: ANZ Bank is investigating agentic AI to automate repetitive work and assist complex decisions.

For a bank, investigation itself is a change-management stage: risk, compliance, operations, and technology stakeholders must agree where autonomy is acceptable. OCM takeaway: agentic AI should move through staged experimentation with clear decision rights and controls.

Source: Capgemini Research Institute, “Rise of Agentic AI.”

Novo Nordisk and Danish Centre for AI Innovation (DCAI)

AI tools: NVIDIA-supported AI capabilities; agentic AI and accelerated computational workflows for life sciences.

How AI augments organizational change: Novo Nordisk and DCAI are partnering with NVIDIA to strengthen AI-enabled life-sciences work.

The organizational-change impact is in shifting scientific and operational workflows toward AI-assisted discovery, modeling, and decision support. OCM takeaway: scientific AI transformation requires trust in model outputs, interdisciplinary collaboration, and governance over data, validation, and reproducibility.

Source: Capgemini Research Institute, "Rise of Agentic AI."

Klarna

AI tools: AI customer-service assistant and support automation.

How AI augments organizational change: Klarna is cited as an example of customer-service automation reshaping service delivery and workforce assumptions.

The OCM lesson is to manage both operational metrics and workforce implications. AI assistants can change support staffing, escalation design, QA, and customer expectations, so leaders must communicate how work will shift and how human service quality will be preserved.

Source: Capgemini Research Institute, "Rise of Agentic AI."

Microsoft

AI tools: Copilot agents; pre-built and user-created agents for tech support, employee self-service, sales, writing coaching, and travel planning.

How AI augments organizational change: Microsoft is enabling employees and customers to build or use agents inside Copilot to support role-based work.

The change-management implication is democratization: employees can create or access agents, which requires enablement, guardrails, and adoption analytics. OCM takeaway: self-service AI agent creation should be paired with governance, community practices, and training on when to automate, assist, or escalate.

Source: Capgemini Research Institute, "Rise of Agentic AI."

American Arbitration Association (AAA)

AI tools: Agentic AI squads trained on closed case files; workflow agents for timelines, evidence review, summary decisions; human-above-the-loop oversight.

How AI augments organizational change: AAA explored end-to-end arbitration workflow transformation while keeping human experts responsible for legal judgment.

AAA used domain-trained agents to compile timelines, review evidence, and propose summary decisions. The change design preserved human oversight, secure training data, and QA control points. OCM takeaway: high-stakes professional workflows can be redesigned if the organization defines where AI drafts, where humans judge, and how quality is audited.

Source: McKinsey podcast summary, "Agentic AI Organizations."

Manufacturing Firms Using Connected-Worker AI

AI tools: Generative AI for SOPs and instructions; AI troubleshooting agents; contextual guidance for frontline workers.

How AI augments organizational change: Manufacturers are using AI to capture expert knowledge and close the expertise gap on the shop floor.

The manufacturing discussion highlights AI as a mechanism for preserving expert knowledge, helping new workers solve problems, and delivering contextual instruction in the flow of work. OCM takeaway: frontline AI adoption requires trust, usability, and reinforcement from supervisors and experienced operators.

Source: Poka podcast summary, "Solving the Expertise Gap with AI in Manufacturing."

Pearson and AWS AI-Readiness Organizations

AI tools: AI-readiness assessment; workforce upskilling; cloud AI capability-building.

How AI augments organizational change: Pearson and AWS frame AI readiness as a workforce capability transformation.

The report supports an OCM case for AI literacy and role-based skill development. OCM takeaway: adoption plans should define readiness by persona—leaders, managers, technical teams, frontline employees—and provide practice opportunities tied to real work.

Source: Pearson / AWS, “AI-Readiness Report 2026.”

The case studies make the pattern visible: successful AI adoption is less about isolated automation and more about redesigning the conditions around work—sponsorship, process ownership, feedback loops, governance, and human accountability. The leadership quotes that follow put language around that pattern. They give change leaders concise ways to reset expectations, frame resistance, and remind executives that AI transformation begins with how leaders choose to work.

Leadership Quotes

Quick Hits

- AI value comes from reimagining workflows end to end—not simply distributing tools.
- Agentic AI shifts human work toward supervision, judgment, exception handling, orchestration, and trust-building.
- Guardrails, observability, auditability, and human accountability must be designed into production workflows from the beginning.
- Adoption accelerates when leaders start small, prove value in visible workflows, and then scale through reusable patterns, data foundations, and operating-model changes.
- Culture matters: curiosity, continuous learning, transparent risk management, and executive role modeling are recurring success conditions.

McKinsey & Company

Source: McKinsey Podcast, "AI is everywhere. The agentic organization isn't—yet," Apr. 2, 2026.

"The great paradox is just that. Companies expect massive transformations from AI and have invested with that mindset. Yet more than 80 percent of companies say they're not yet seeing impact on the bottom line from those investments."

Who: Alexis Krivkovich, Senior Partner, McKinsey | **Theme:** Leadership mindset / pilot-to-scale paradox

Why it matters: Use this as the executive reset: AI value is not primarily a tooling problem; it is an operating-model and change problem. Leaders must convert experimentation into enterprise redesign.

"The day-to-day workflows and the rituals around ways of working will need to fundamentally change."

Who: Alexis Krivkovich, Senior Partner, McKinsey | **Theme:** Work design / operating model

Why it matters: A concise way to frame agentic AI as work redesign, not simply employee augmentation. The "rituals" language is useful for change leaders because it points to meetings, handoffs, decisions, reviews, and governance routines.

"Just about everybody in the workforce is going to need a new job description in the next two to three years. Most roles won't go away, but they'll be reshaped."

Who: Alexis Krivkovich, Senior Partner, McKinsey | **Theme:** Roles and skills

Why it matters: This is a strong quote for workforce planning: change leaders should plan for role redesign, capability mapping, and performance-system updates—not only reskilling catalogs.

"The best use cases, where AI is enabling scalable impact, are where a workflow can be reimaged in its entirety."

Who: Alexis Krivkovich, Senior Partner, McKinsey | **Theme:** End-to-end workflow redesign

Why it matters: Practitioner takeaway: prioritize workflows that cross silos and have measurable outcomes. Avoid isolated “AI task” wins that do not change the end-to-end process.

“Where does it benefit from having an agent? Where do I need a human in the loop, or above the loop, to supervise? Where do I need a team of agents?”

Who: Alexis Krivkovich, Senior Partner, McKinsey | **Theme:** Human-in-the-loop / above-the-loop

Why it matters: This quote converts governance into a design question. It can be used as a workshop prompt for redesigning underwriting, claims, finance, HR, legal, or customer operations workflows.

“If this will radically transform everything about our business, we as a leadership team need to start by radically transforming ourselves.”

Why it matters: Useful for executive alignment: leaders should demonstrate changed work habits before asking the enterprise to adopt AI-enabled ways of working.

Who: Alexis Krivkovich, Senior Partner, McKinsey | **Theme:** Leadership role modeling

“A huge trust gap exists today.”

Who: Alexis Krivkovich, Senior Partner, McKinsey | **Theme:** Culture / resistance / trust

Why it matters: A compact quote for communications plans: adoption depends on acknowledging hallucinations, low-quality AI output, and risk management—not just selling productivity upside.

“Change management is no longer an episodic thing. It’s a perpetual state.”

Who: Alexis Krivkovich, Senior Partner, McKinsey | **Theme:** Change capability as operating muscle

Why it matters: This is a strong closing quote for transformation offices: AI adoption requires continuous sensing, learning, governance, and capability-building rather than one-time rollout plans.

“Human accountability and oversight will remain essential, but their nature will change.”

Who: Alexander Sukharevsky, Alexis Krivkovich, Arne Gast, Arsen Storozhev, Dana Maor, Deepak Mahadevan, Lari Hämäläinen, and Sandra Durth, McKinsey authors | **Theme:** Agentic organization / governance

Why it matters: Use this to explain governance evolution: leaders and compliance teams move from reviewing every step to defining policies, monitoring outliers, and setting escalation thresholds.

Source: McKinsey article, “The agentic organization: Contours of the next paradigm for the AI era,” Sept. 26, 2025.

“Simply giving tools to users won’t work.”

Who: McKinsey authors, “The change agent” | **Theme:** Scale / agent factories / data foundations

Why it matters: A blunt adoption quote: change leaders need SOP integration, usage monitoring, role modeling, training, budget capture, data foundations, and governance—not tool access alone.

Source: McKinsey Quarterly, “The change agent: Goals, decisions, and implications for CEOs in the agentic age,” Oct. 1, 2025.

Poka

“AI will do ninety nine percent of the work... But ultimately, you will always and always have a human that will need to not only confirm that these steps are valid, but also make sure that... you cannot afford a mistake.”

Who: Antoine Bisson, CEO and Co-founder, Poka | **Theme:** Human oversight / frontline manufacturing

Why it matters: Use this for frontline change governance: AI can capture and structure expert knowledge, but validation remains human-owned where quality, safety, or operational risk is high.

Source: Emerj AI in Business Podcast, "AI in Organizational Change Management for Manufacturing."

Switchboard

"I know it sounds weird, but like conceptually, just getting people to understand what's possible... is a lot of the biggest challenges."

Who: Justin Watt, CEO and Co-founder, Switchboard | **Theme:** Adoption patterns / showing what is possible

Why it matters: A practical adoption quote: small, visible pilots can "unfreeze" skepticism by translating abstract AI potential into tangible workflow improvements.

Source: Digital Transformation Podcast, "Why AI Adoption Fails & Building Scalable Systems."

Safe / PaySafe

"Junior interns who haven't slept."

Who: Amar Aksha, SVP & Chief Architect at Safe; quoted in PDF as views not representing PaySafe | **Theme:** Governance / guardrails / agent trust

Why it matters: The metaphor is useful for agent governance: agents may be capable, but they need policy envelopes, access controls, negative-path testing, uncertainty handling, and auditability before production deployment.

Source: Emerj AI in Business Podcast, "Bridging the Consistency Gap — From AI Demos to Reliable Enterprise Production."

Experian

“Consumer-first AI.”

Who: Debbie Hsu, EVP Product, Experian Consumer Services | **Theme:** Trust / transparency / customer control

Why it matters: Experian’s framing is useful for regulated, high-trust domains: start with customer need, trusted data, explainability, guardrails, and user agency—not generic automation.

Source: Digital Transformation Podcast, “GenAI-led digital transformation and consumer-first AI at Experian.”

Source Notes

· May Dispatch Sources PDF: uploaded source bundle; OCR reviewed for podcast metadata and summarized quote context on pp. 630–631, 852–853, 872–873, and 880–881.

· McKinsey & Company, “AI is everywhere. The agentic organization isn’t—yet,” The McKinsey Podcast, Apr. 2, 2026.

· McKinsey & Company, “The agentic organization: Contours of the next paradigm for the AI era,” Sept. 26, 2025.

· McKinsey Quarterly, “The change agent: Goals, decisions, and implications for CEOs in the agentic age,” Oct. 1, 2025.

Automation World, “Inside Schneider Electric’s New Industrial Copilot with Aurelien LeSant,” Aug. 5, 2025.

These leadership quotes provide the vocabulary; the OrgChange.AI Nine-Square Grid provides the implementation discipline. Once leaders accept that AI requires workflow reinvention, role redesign, guardrails, and continuous learning, the next question is where to intervene. The Grid answers that question by mapping change work across people, process, and technology—so teams can move from compelling language to coordinated action.

The OrgChange.AI Nine-Square Grid

At-a-glance Grid

Change Impact ↓ / Change Model →	Kotter's 8 Steps	Lewin's 3 Stages	ADKAR
People	Square 1: Urgency & Awareness	Square 2: Unfreezing & People Management	Square 3: Awareness & Knowledge Sharing
Process	Square 4: Coalition Building & Process Design	Square 5: Changing & Process Transformation	Square 6: Desire & Process Optimization
Technology	Square 7: Vision Communication & Technical Infrastructure	Square 8: Refreezing & Technical Integration	Square 9: Ability & Technical Enablement

Each bullet includes an in-text citation to the source study or article from the PDF. Findings are phrased as implications for the grid square, not as unsupported recommendations.

Square 1 — People / Kotter: “Urgency & Awareness”

- AI creates a credible urgency message because adoption is already widespread in consequential settings: 65% of U.S. hospitals reported using AI or predictive models integrated with EHRs in 2023, with common uses including inpatient risk prediction, outpatient follow-up targeting, scheduling, billing automation, monitoring, and treatment recommendations. (Nong, Adler-Milstein, Apathy, Holmgren & Everson, “Current Use And Evaluation Of Artificial Intelligence And Predictive Models In US Hospitals”)
- Leaders can make the “why now” case by showing that AI’s labor-market effects are already measurable: AI-exposed sectors experienced output gains that substantially exceeded wage-bill gains, implying productivity growth but also pressure on labor share and role design. (Johnston & Makridis, “AI, Output, and Employment”)
- Awareness campaigns should acknowledge uncertainty rather than overpromise: the AI labor debate depends on unresolved questions about capability progress, enterprise adoption speed, and whether AI creates or displaces jobs faster. (Tawil, “The AI Labor Debate: Three Views on the Future of Work”)

Square 2 — People / Lewin: “Unfreezing & People Management”

- Unfreezing requires addressing mindset and willingness, not just tooling: Stanford’s study of 51 deployments found that similar AI use cases took weeks in some firms and years in others, with differences attributed to

executive sponsorship, existing organizational processes, and end-user willingness. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

- People managers should expect resistance to emerge from staff functions as well as frontline users; the Stanford playbook notes that staff functions were frequently a source of resistance, though some became enablers after their concerns were addressed. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

- In AI readiness, mindset and governance are explicit barriers: Pearson/AWS reports that "the biggest barrier is not the technology" but "the mindset and the governance," with AI's rapid pace creating friction for institutions designed to move slowly. (Pearson & AWS, "AI Readiness: Building the Bridge from Higher Education to Work")

Square 3 — People / ADKAR: "Awareness & Knowledge Sharing"

- ADKAR's Awareness and Knowledge steps need measurable skill visibility: Docebo's 2026 learning report states that skills and AI readiness must be visible, measurable, and connected to work that drives business outcomes. (Docebo, "The AI Readiness Gap: The 2026 Enterprise Learning Wake Up Call")

- Faculty and trainer capability is a leading indicator of learner readiness: Pearson/AWS reports that student confidence rises where faculty AI adoption is higher, course coverage is deeper, and AI is treated as a transdisciplinary capability rather than an elective. (Pearson & AWS, "AI Readiness: Building the Bridge from Higher Education to Work")

- Knowledge sharing must include rules for responsible use: Pearson/AWS found that formal AI coverage remains superficial, with only about one in three learners reporting AI is covered extensively or quite a lot, and it highlights a "trust gap" around ungoverned AI use. (Pearson & AWS, "AI Readiness: Building the Bridge from Higher Education to Work")

Square 4 — Process / Kotter: "Coalition Building & Process Design"

- Coalitions need business ownership, not technology ownership alone: failed AI efforts in the Stanford sample often treated AI as a technology project

rather than a process and change-management project. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

- Effective sponsors do more than approve projects; they clear blockers weekly, bridge business and technical teams, tie AI adoption to corporate OKRs, and create permission to fail. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")
- Coalition design should include evaluation and governance roles because hospitals using predictive models often relied on vendors or health systems for models, making local evaluation essential for deciding whether to implement, alter, or deactivate models. (Nong et al., "Current Use And Evaluation Of Artificial Intelligence And Predictive Models In US Hospitals")

Square 5 — Process / Lewin: "Changing & Process Transformation"

- During the "change" stage, process redesign is often the work: 77% of the hardest AI implementation challenges in Stanford's cases were invisible and intangible costs—change management, data quality, and process redesign. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")
- Successful process transformation was iterative: every successful project in the Stanford sample where the approach could be identified used iteration rather than a one-shot deployment. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")
- Organizations should avoid applying AI to broken workflows; Stanford's cases showed first attempts failed when AI was applied to broken processes or when teams assumed the model would fix problems that required redesigning the work itself. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

Square 6 — Process / ADKAR: "Desire & Process Optimization"

- Desire is strengthened when AI is connected to concrete outcomes: Stanford found escalation-based models—where AI handles 80% or more autonomously and humans review exceptions—were associated with 71% median productivity gains versus 30% for approval models, while noting task

differences may partly explain the gap. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

- Process optimization should be measured beyond cost savings; Stanford notes many implementations are measured as savings, while the highest returns came from companies using AI to increase revenue through personalization, faster sales, and other growth-oriented use cases. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

- Reinforcement mechanisms should include local accuracy and bias evaluation, because unequal or inconsistent evaluation of AI models can create risks and inequities. (Nong et al., "Current Use And Evaluation Of Artificial Intelligence And Predictive Models In US Hospitals")

Square 7 — Technology / Kotter: "Vision Communication & Technical Infrastructure"

- The technology vision should make infrastructure visible: Stanford practitioners said the hardest work included process documentation and data architecture, and that better data investment improves AI solution value. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

- Vision communication should avoid implying that models alone deliver transformation; Stanford's key finding was that technology was not the hardest part, with the largest barriers lying in change management, data quality, and process redesign. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

- In regulated or high-stakes contexts, technical infrastructure must support transparency and local evaluation; federal health IT rules require developers of certified health IT to provide users with information needed to evaluate AI, including local evaluation processes and results. (Nong et al., "Current Use And Evaluation Of Artificial Intelligence And Predictive Models In US Hospitals")

Square 8 — Technology / Lewin: "Refreezing & Technical Integration"

- Refreezing depends on embedding AI into stable operating models rather than pilots; Stanford found 61% of successful projects had at least one prior

failure, suggesting stabilization often follows learning from earlier attempts. (Pereira, Graylin & Brynjolfsson, "The Enterprise AI Playbook")

- Technical integration should include monitoring for model fit in local context; Nong et al. warn that without local evaluation, ineffective models in a specific local context may nevertheless be used. (Nong et al., "Current Use And Evaluation Of Artificial Intelligence And Predictive Models In US Hospitals")

- Refreezing the talent system requires durable governance and curriculum updates because Pearson/AWS found traditional multi-year curriculum cycles are out of sync with the iterative demands of generative AI diffusion in workplaces. (Pearson & AWS, "AI Readiness: Building the Bridge from Higher Education to Work")

Square 9 — Technology / ADKAR: "Ability & Technical Enablement"

- Ability requires hands-on enablement, not awareness alone: Pearson/AWS reports that both university education and practical work experience are viewed as important foundations for AI-enabled careers. (Pearson & AWS, "AI Readiness: Building the Bridge from Higher Education to Work")

- Enablement dashboards should track readiness gaps: Pearson/AWS compares self-reported graduate AI readiness with employer-rated capabilities, underscoring the need to measure perceived and demonstrated ability separately. (Pearson & AWS, "AI Readiness: Building the Bridge from Higher Education to Work")

- Technical enablement must include bias and safety evaluation skills; U.S. hospitals using AI and predictive models need evaluation and governance to ensure models are fair, appropriate, valid, effective, and safe. (Nong et al., "Current Use And Evaluation Of Artificial Intelligence And Predictive Models In US Hospitals")

Source Studies and Articles Cited

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